

University of Nebraska - Lincoln

DigitalCommons@University of Nebraska - Lincoln

Faculty Publications, UNL Libraries

Libraries at University of Nebraska-Lincoln

5-1-2008

Chat & Instant Messaging for Reference Services: a Selected Bibliography

Tracy Bicknell-Holmes

University of Nebraska-Lincoln, tbicknel@gmail.com

Follow this and additional works at: <https://digitalcommons.unl.edu/libraryscience>



Part of the [Library and Information Science Commons](#)

Bicknell-Holmes, Tracy, "Chat & Instant Messaging for Reference Services: a Selected Bibliography" (2008). *Faculty Publications, UNL Libraries*. 151.

<https://digitalcommons.unl.edu/libraryscience/151>

This Article is brought to you for free and open access by the Libraries at University of Nebraska-Lincoln at DigitalCommons@University of Nebraska - Lincoln. It has been accepted for inclusion in Faculty Publications, UNL Libraries by an authorized administrator of DigitalCommons@University of Nebraska - Lincoln.

Chat & Instant Messaging for Reference Services: a Selected Bibliography

By Tracy Bicknell-Holmes, University of Nebraska Lincoln Libraries

NLAQ, vol 38, no. 4, Winter 2007. pp. 3-8

"The user is not remote, it is the library that is remote from the user" (Lipow, 1999)

"The pervasive presence of instant messaging will be ignored only by organizations willing to risk irrelevancy." (Breeding, 2003)

"Although it's laudable that librarians built these digital libraries for their users, libraries now need to be thinking about staffing them with actual human beings and providing live, interactive services for their users" (Francoeur, 2001)

"I Wouldn't Have Asked for Help if I had to go to the Library" (Lee, 2004)

The amount of literature that has been published on virtual reference is staggering, and what has been published on web-based chat and instant messaging (im) as vehicles for reference is voluminous. Although from the quotes above and much of the literature that has been written, you might get the impression that offering reference services via chat/im is a "no-brainer". As Ben Chan (2005) argues, libraries must cater to "the increasing number of users who prefer to access information outside the physical library's boundaries, at any time of the day or night." He sees the virtual library and virtual librarians as parallel and complimentary to the physical library and physical reference desks. However, using these technologies for reference is not a foregone conclusion. As modes for offering reference services, they seem to have some pesky problems such as low traffic, longer transaction times, and staffing cost issues that have not been easily resolved.

This bibliography is by no means comprehensive! As the title claims, it is truly a selective set of resources. I have attempted to gather resources, primarily articles published since 2000, in broad categories that are representative of the activities, research efforts, and dialog that have popped up in the literature and continue to swirl around in the debate about chat and im as vehicles for reference services. Most of the key authors conducting research and study in the area of chat and im are represented here, although not all of each author's articles are listed. This bibliography should serve as a starting point for anyone who is interested in learning more about these technologies for library services.

To Chat or Not to Chat

The verdict on whether reference services via chat and instant messaging should become a standard service option in our libraries has by no means been pronounced, although much has been written about the disappearance of reference desks and the steady decline of reference statistics. The articles here are a small representative sample of the literature arguing for and against the adaptation of these technologies for reference services. Coffman and Arret sparked much discussion and response with their two part series *To Chat or Not to Chat* in 2004. The articles are a must read for anyone considering jumping into the chat and im fray. The authors

do an excellent job of outlining the history of chat/im reference services and analyzing the apparent overall success or failure of these services including that of fee-based commercial services using chat/im. They outline the continuing challenges to offering a chat/im service and develop a thought provoking argument about potential alternatives that the authors feel might be more sustainable. In his presentation, *Going Virtual: Technology and the Future of Academic Libraries*, Hubbard (2007) outlines an argument that we have already "lost the battle of controlling information and being the source of it" to Google and other commercial vendors. Although he doesn't always effectively document his sources, he argues that "virtual reference services are essential to the survival of our profession and libraries in general" a drum beat repeated in much of the literature. Zanin-Yost (2004) presents another view of the history of digital reference beginning with the development of electronic resources outlining terminology along the way. Her article presents a good basic description of chat services and a summary of implications for reference according to the literature up to that point. Carlson and Thomas both present less scholarly arguments for integrating new technologies into reference - "It's not either/or - it's and" (Thomas, 2005).

- Carlson, Scott. (2007). Are reference desks dying out? Librarians struggle to redefine - and in some cases eliminate -- the venerable institution. *Chronicle of Higher Education*, 53(33), A37-A39.
- Coffman, Steve & Arret, Linda. (July/August 2004). To chat or not to chat - taking another look at virtual reference: Part 1. *Searcher*, 12(7),38-47.
- Coffman, Steve & Arret, Linda. (September 2004). To chat or not to chat - taking another look at virtual reference: Part 2. *Searcher*, 12(8),49-57.
- Hubbard, John. (May 16, 2007). Going virtual: technology & the future of academic libraries. Presented during library council of southeast Wisconsin annual conference. Retrieved October 22,2007, from <http://www.mcfls.org/librarycouncil/1academic.pdf>
- Janes, Joseph. (2002) Digital reference: reference librarians' experiences and attitudes. *Journal of the American Society for Information Science and Technology*, 53(7), 549-566.
- Thomas, Margaret.. (July 2005). Scrutinizing virtual reference. *Alki*, 21(2), 16-18.
- Zanin-Yost, Alessia. (Fall 2004) Digital reference: what the past has taught us and what the future will hold. *Library Philosophy and Practice*, 7(1). Retrieved November 28,2005, from: <http://www.webpages.uidaho.edu/~mbolin/zanin-yost.htm>.

User Preferences

Many of the past research techniques on in-person reference service have been adapted to study chat and im as vehicles for reference service and the research is beginning to shed light on chat/im from the user's perspective. Cummings, Cummings and Frederiksen (2007) discuss use of chat by patrons for non-library activities and report patron potential interest in a library chat service compared to actual use of the service. There is a brief but very good summary on the marketing issues that might account for the differences between patron service use and professed interest. Pomerantz and Luo (2006) examined whether users of NCKnows virtual reference service had used other library reference services and found 19% were new users, patrons who had never used a library reference service in any format. In addition, Pomerantz and Luo studied patron motivations for using NCKnows and the questions asked - 51% were asking work-related

questions. They also compared satisfaction immediately after a chat session with follow-up interviews at a later date.

In *Evaluating Virtual Reference from the Users' Perspective*, Nilsen and Ross (2006) present an excellent summary of the literature on techniques for assessing virtual reference, finding that early research "mirrors the early phase of evaluation studies of traditional reference" and noting that the Hernon and McClure's 55% accuracy rule seems to hold for virtual reference as it does for in-person reference. The article includes a set of service "dos and don'ts" for virtual reference based on aspects of virtual reference services that users found helpful and not helpful. One surprising result of this study is what users said about chat input forms. At UNL we have been working to simplify our question submission forms to make it easier for the user to submit a question. However, Nilsen and Ross noted that the simple question submission forms that asked the user to "be detailed" resulted in confusion on the part of users - "Many users simply don't know what kinds of detail librarians need or find useful." The authors agree with Joseph Janes that we should design our input forms to conduct part of the reference interview for us, and they point to the submission forms at the Internet Public Library (<http://wv.vy.ipl.org/div/askus/>) as an example.

One of the interesting aspects of virtual reference service that I have noticed while monitoring the UNL 24/7 cooperative chat service is how often patrons are using chat when in a library or near a library reference desk. Ruppel and Fagan's *Instant Messaging Reference: Users' Evaluating of Library Chat* (2002) provides an excellent summary of the research done on why users do not ask questions at service points. The accessibility of chat services for visually impaired patrons is the focus of Peters and Bell's article (2006) on *Virtual Reference Services for the Print Impaired*. The article describes the barriers posed by most chat software and describes a collaborative reference service offered by a coalition of talking book and Braille libraries called InfoEyes (<http://www.infoeyes.org>).

Cummings, Joel, Cummings, Lara, & Frederiksen, Linda. (2007). User preferences in reference services: Virtual reference and academic libraries. *portal: Libraries & the Academy*, 7(1), 81-96.

Nilsen, Kristi, & Ross, Catherine Sheldrick. (2006). Evaluating virtual reference from the users' perspective. *Reference Librarian*, 46(95/96), 53-79.

Pomerantz, Jeffery & Lou, Lili. (2006). Motivations and users: Evaluating virtual reference services from the users' perspective. *Library and Information Science Research*, 28(3), 350-373.

Peters, Tom & Bell, Lori. (November/December 2006) Virtual reference services for the print impaired: separate but not equal. *Computers in Libraries*, 26(10), 24-27.

Ruppel, Margie, & Fagan, Jody Condit. (2002). Instant messaging reference: Users' evaluation of library chat. *Reference Services Review*, 30(3), 183-197.

What They Asked and How We Answer

Perhaps some of the most interesting literature evaluating chat for reference service is the articles evaluating how effectively we answer reference questions via these formats. The availability of chat transcripts for analyzing interactions has made evaluation of these reference

encounters much easier than in-person or phone reference and many scholars are taking advantage of this readily available data. Kwon (2007) examined cooperative staffing in relation to the quality of answers and satisfaction of patrons. Kwon found that the most frequently asked question were local library circulation questions, yet these questions were answered least well by non-local cooperative staffers. The questions answered most completely by cooperative staffers were factual and subject based questions. Kwon also found that the completeness of the answer related to user satisfaction. In *Same Questions, Different Venue*, Fennewald (2006) discusses the frequency of questions across email, virtual reference and in-person reference services and the level of complexity of the questions received via each format. In contrast to Kwon, Fennewald found that reference questions comprised a large percentage of virtual reference (70%) and email (60%) questions, but less than half of in-person reference questions (38%). In addition, Fennewald found that the reference questions asked in-person at a desk were 66% ready reference, while 85% of chat and email questions were likely to be regarding search strategies. This contradicts common perceptions that chat/im are best used for short quick-answer questions.

Several studies have found a surprising lack of reference interviewing in chat transcripts, and a connection between reference interviewing and patron satisfaction. In *Peer Review of Chat Reference Transcripts*, Pomerantz, Luo and McClure compare the performance of public and academic librarians and confirm that the reference interview is sometimes skipped in chat sessions. Hyde and Tucker-Raymond (2006) evaluated librarian performance against a list of service guidelines in relation to patron satisfaction. They found that "patrons expressed satisfaction 65 percent of the time when a reference interview was done, but only 53 percent of the time when one was not done". Nilsen (January 2004) found that three reference behaviors led to patron dissatisfaction: bypassing the reference interview, referring a user to a source without asking if it was useful, and failure to ask a follow-up question to find out if the patron got the answer they needed. Nilsen's article contains interesting quotes from users that help illustrate her research results. Shachaf and Horowitz's *Are virtual reference services color blind* (2006) is a thought provoking piece on the potential for discrimination to take place in a virtual environment. The article reinforces the importance of using scripts and following service policies to ensure equity of treatment and raises an interesting conundrum - how do we address patrons virtually if we're not sure which name is the "first" name or what gender they are?

Kibbee (2006) evaluated virtual reference service to unaffiliated users and found that they preferred chat to email 2-1. Kibbee's article also describes unique service issues that arise when serving non-affiliates. Ryan, Daugherty, and Mauldin (2006) set up a good structure for evaluating chat transcripts in terms of customer service and *Teens are from Neptune, Librarians are from Pluto*, evaluates public libraries' homework help services.

Fennewald, Joseph. (2006). Same questions, different venue: An analysis of in-person and online questions. *Reference Librarian*, 46(95/96),20-35.

Houlson, Van, McCready, Kate, & Pfahl, Carla Steinberg. (2006). A Window into our patron's needs: Analyzing data from chat transcripts. *Internet Reference Services Quarterly*, 11(4), 19-39.

Hyde, Loree, & Tucker-Raymond, Caleb. (2006). Benchmarking librarian performance in chat reference. *Reference Librarian*, 46(95/96),5-19.

- Kibbee, Jo. (2006). Librarians without borders? virtual reference service to unaffiliated users. *Journal of Academic Librarianship*, 32(5),467-473.
- Kwon, Nahyun. (2007). Public library patrons' use of collaborative chat reference service: The effectiveness of question answering by question type. *Library & Information Science Research*, 29(1), 70-91..
- Nilsen, Kristi. (January 2004). The library visit study: User experiences at the virtual reference desk. *Information Research*, 9(2)
- Pomerantz, Jeffrey, Lou, Lili, & McClure, Charles R. (2006). Peer review of chat reference transcripts: Approaches and strategies. *Library & Information Science Research*, 28(1), 24-48.
- Ryan, Jenna, Daugherty, Alice L., & Mauldin, Emily C. (Winter 2006) Exploring the LSU Libraries' virtual reference transcripts: an analysis. *Electronic Journal of Academic and Special Librarianship*, 7(3),1-1. .
- Shachaf, Pnina, & Horowitz, Sarah. (2006). Are virtual reference services color blind? *Library & Information Science Research*, 28(4), 501-520.
- Walter, Virginia A., & Mediavilla, Cindy. (Fall 2005). Teens are from Neptune, librarians are from Pluto: An analysis of online reference transactions. *Library Trends*, 54(2), 209-227.
- Ward, David. (Fall 2004) Measuring the completeness of reference transactions in online chats: results of an unobtrusive study. *Reference and User Services Quarterly*, 44(1), 46-56.

The Beginning, the End,... the Suite of Services?

There is a fascinating parallel in the discussions in the current literature when compared to the literature in the 1930s and 1940s over adoption of the telephone for reference service. Some of the discussion on chat/im for reference mirror discussions of staffing, cost and multitasking from the literature about that adaptation of the telephone for reference service. The articles in this group represent literature on what it takes to start and build a chat/im reference service, studies of services that have been discontinued, and how some libraries are adapting by thinking of chat/im services multiple format options for users. In *Getting Beyond Institutional Cultures*, Devlin and her co-authors (2006) describe the building of a collaborative reference service. The article includes a sample memorandum on understanding on sharing the service between institutions. Quinn and Briggs (2006) discuss developing a cooperative statewide virtual reference service and the amount of effort and persistence required to build a reliable network and to increase user traffic enough to attract additional participants. Fagan and Calloway's article in 2001 outlines what to look for in system choice and in combination with Houghton and Schmidt's article (2005) gives a good overview of chat and im features. Francoeur's *Analytical Survey of Chat Reference Services*, (2001) discusses reasons why libraries have been moving toward virtual reference, and does a good job of outlining what to consider before starting a service, including potential problems of user interactions in the environment. Foley (2002) does a good job of outlining staffing, training, communication and publicity issues related to an im service. Foley also describes the perceptions of an instant messaging as a format and the perceived pressure on librarians of the instant answer.

Ward (2006) reported a fascinating study on combining instant messaging and 24-7 chat service into a suite of reference services. In the study, vendor-based chat sessions declined by half while the overall virtual reference increased 39%, suggesting a shift to im. In fact, Ward claims that im quickly became the most popular virtual reference service offered. IM users were primarily undergraduates, while graduates and undergraduates used chat equally. Faculty tended to use chat. Peak usage mirrored these patterns, with chat tapering off after 5pm and im traffic heaviest between 1-9pm. Ward advocates having both an im and chat service to offer patrons a choice and potentially attract a wider range of users to virtual reference services.

One of the most interesting articles is Radford and Kern's (2006) analysis of nine discontinued chat reference services and the reasons for the discontinuation, reasons that are reflected in numerous other articles on discontinued services. The article includes an excellent bibliography, and some memorable quotes, such as "Burnout is nothing compared to boredom" to describe the problem of monitoring a service with low traffic. The length of time to build the service is noted, along with an excellent analysis of how librarian fears of too many patron chat requests have lead libraries to skimp on marketing, something that could very well contribute to boring chat/im reference shifts with few patron chat sessions.

Devlin, Frances A., Bunch, Nancy L., Stockham, Marcia G., Pedersen Summey, Terri, & Turtle, Elizabeth C. (2006). Getting beyond institutional cultures: When rivals collaborate. *Journal of Library Administration*, 45(112),149-168.

Fagan, Jody Condit, & Calloway, Michelle. (2001). Creating an instant messaging reference system. *Information Technology & Libraries*, 20(4), 202.

Foley, Marianne. (2002). Instant messaging reference in an academic library: A case study. *College & Research Libraries*, 63(1),36.

Francoeur, Stephen. (2001). An analytical survey of chat reference services. *Reference Services Review*, 29(3), 189-203.

Houghton, Sarah & Schmidt, Aaron. (July/August 2005) Web-based chat vs. instant messaging: who wins? *Online*, 24(4), 26-3

Probst, Laura K. (2005). Digital reference management: a Penn State case study. *Internet Reference Services Quarterly*, 10(2),43-59.

Quinn, Todd & Briggs, Lea. (2006) Small collaboration, big effort: the realities of a small statewide collaborative virtual reference service. *College and Undergraduate Libraries*, 13(4),97-109.

Radford, Marie L., & Kern, M. Kathleen. (2006). A multiple-case study investigation of the discontinuation of nine chat reference services. *Library & Information Science Research*, 28(4),521-547.

Ward, D., & Kern, M. K. (2006). Combining IM and vendor-based chat: A report from the frontlines of an integrated service. *portal: Libraries & the Academy*, 6(4),417-429.

Policies and Management Issues

There are numerous articles available on policy and management issues for chat/im services. The following articles are a select group of articles that stand out to me due to the approach taken or the uniqueness of the topic. Some are resources I consider valuable for librarians developing service policies. Brown, Maximiek, and Rushton (2006) make practical recommendations on

managing an im service. As the literature has shown over and over, they point out that im sessions often take longer than in-person transactions, and note that contrary to perceptions, most im patrons are willing to wait for short periods of time to get the help they need. Radford's articles and presentation (2006, 2004) do an excellent job of discussing interpersonal communication challenges related to im/chat encounters. Her presentation, *Yo Dude! Y R U Typin so Slow?*, contains a very nice summary of communication tips and a good bibliography. Ward (2005) offers an interesting analysis of chat session length and some strategies for managing session length.

I have also included in this section an excellent resource on training for virtual reference (Hirko & Ross, 2004), and some Internet resources. ALA RUSA's *Guidelines for Implementing and Maintaining Virtual Reference Services*, provide definitions, tips on preparing for a service and service guidelines. The Library Success Best Practices Wiki section on Online Reference has links to a whole range of virtual reference services including technologies beyond chat and IM such as VOIP and SMS, and includes links to discussions of software.

- Brown, Elizabeth, Maximiek, Sarah, & Rushton, Erin E. (2006). Connecting to students: Launching instant messaging reference at Binghamton University. *College & Undergraduate Libraries*, 13(4), 31-42.
- Hirko, Buff & Ross, Mary Bucher.. (2004) Title Virtual reference training: the complete guide to providing anytime, anywhere answers. Chicago: American Library Association, 2004
- Radford, Marie. L. (2006). Interpersonal communication in chat reference: Encounters with rude and impatient users. In R. D. Lankes, E. Abels, M. White & S. N. and Haque (Eds.), *The virtual reference desk: Creating a reference future* (pp. 41-73). New York: Neal-Schuman.
- Radford, Marie. L. (June 2006). Encountering virtual users: A qualitative investigation of interpersonal communication in chat reference. *Journal of the American Society for Information Science and Technology*, 57(8), 1046 - 1059.
- Radford, Marie. L., & and Thompson, I. (November 8-9, 2004). Yo dude! Y R U typin so slow? *Online Proceedings of the Virtual Reference Desk 6th Annual Conference*, Cincinnati, OH. Presentation slides downloaded November 9, 2007 from:
<http://data.webjunction.org/wj/documents/12499.pdf>; summary and bibliography from
<http://data.webjunction.org/wj/documents/12497.pdf>
- ALA RUSA Guidelines for Implementing and Maintaining Virtual Reference Services. Downloaded November 15, 2007 from:
http://www.ala.org/alainlisa/rusaprotoos/reference_guide/virtrefguidelines.cfm
- Ward, D. (2005). How much is enough? managing chat length. *Internet Reference Services Quarterly*, 10(2), 89-93.
- Online Reference. Library Success: Best Practices Wiki. URL:
http://www.libsuccess.org/index.php?title=Online_Reference

Conclusion

Even as I wrote this article I was bumping into articles I had not yet seen. There is so much written in the literature on this topic that each new article seems to have at least a few new

materials in the bibliography, so if you have read much about chat or im for reference services, I've undoubtedly missed an article that you found interesting or feel is a must read. However, if you are interested in the topic but have not yet done any research, even if you read selectively from the articles listed here you will have a good basic understanding of many of the issues and much of the debate surrounding chat and im for reference services and the names of key authors to pursue for more information.

Additional Resources:

Breeding, Marshall.. (November/December 2003) Instant messaging: it's not just for kids anymore. *Computers in Libraries*, 23(10), 38-40.

Chan, Ben. (2005). 24-hour reference service. *Library & Information Update*, 4(6), 24-26.

Francoeur, Stephen. (2001). An analytical survey of chat reference services. *Reference Services Review*, 29(3), 189-203.

Lee, Jennifer, Hayden, K. Alix & MacMillan, Don, (Fall 2004). I Wouldn't Have Asked for Help if I had to go to the Library: Reference Services On Site. *Issues in Science & Technology Librarianship* 41, from: <http://www.istl.org/04-fall/article2.html>

Lipow, Anne.G. (January 1999). Serving the remote user: reference service in the digital environment. *Proceedings of the Ninth Australasian Information Online & On Disc Conference and Exhibition*. Sydney, Australia. Downloaded November 9, 1007 from: <http://www.!!csu.edu.au/special/online99/proceedings99/200.htm>